



CANOPY FINANCIAL



CANOPY
Greenville LLC.

THE CANOPY COMMITMENT

At Canopy, we want every client to experience the power of a plan. By providing a complete financial analysis of your current situation, we construct a financial road map that is as unique as your life's journey.

WE HELP YOU:

Build Wealth – Through time-honored investment strategies
Preserve Wealth – To ensure a fully-funded retirement
Protect Wealth – With suitable insurance coverage
Keep Wealth – By optimizing tax ramifications
Transfer Wealth – By continuing your legacy after you are gone

READY, SET, STOP!



Before you send your money out to work for you, make sure you have a plan.

Canopy is the home of MONEY, MAP, GO!
Your customized financial road map that
helps get you to your destination.

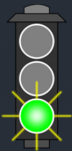
READY, SET, CALL!

Your dreams fuel your goals.



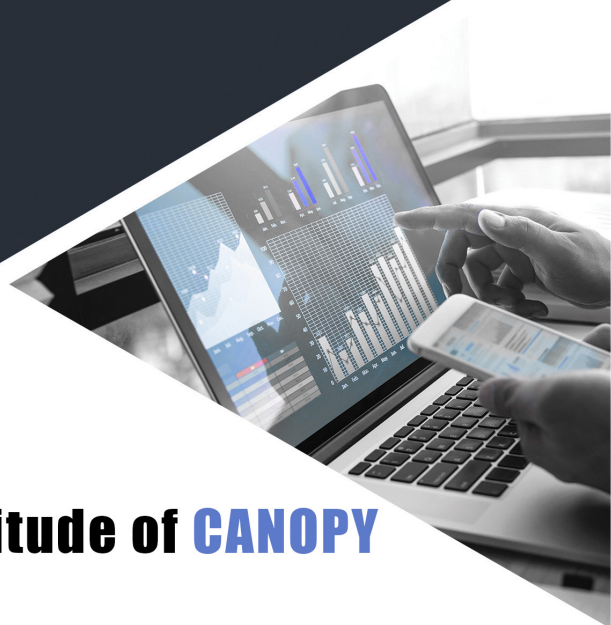
READY, SET, GO!

Contact us today to get started
E: mike@canopyfp.com
C: 864-787-7347



At Canopy, we can:

- Identify high growth and income generating stocks
- Counterbalance investments against extreme volatility
- Lock in profits based on up-to-date valuations
- Target 8% income on the more conservative parts of the portfolio
- Use proprietary trading strategies to optimize returns



The Can-Do Attitude of CANOPY



We can: Provide sustainable growth for high-net-worth individuals and institutions.



We can: Maximize the decades of experience of the Canopy team members (the "Can-do" team).



We can: Achieve excellent return despite pandemics, recessions, wars and rumors of war.



We can: Research high growth and income stocks and maintain strategies for downside protection while coordinating with the client's financial plan.



Comprehensive Financial Planning The Five Pillars

1) Wealth Management – Building Wealth: It's not how much money you make, it's how much money you make work for you. At Canopy, our financial planners have more than 25 years of experience making money work. By focusing on active money management, we provide excellent long-term results for our clients.

2) Retirement Planning – Preserving Wealth: When can I retire? At Canopy, our clients experience the power of a plan, knowing how to get to retirement and to keep their retirement fully funded. You've worked for your money; retirement is when you can fully enjoy your money working for you.

3) Insurance Planning – Protecting Wealth: Life is a risky venture. Having insurance protects your money from being swallowed up by unexpected and unwelcome calamities. Knowing how much insurance and what kinds of insurance are necessary for your individual situation keeps your money alive and working for you. Canopy has an insurance specialist on staff who assesses each client's individual insurance needs.

4) Tax Planning – Keeping Wealth: Knowledge is power. Knowing the tax implications of various financial decisions can optimize the amount of money you get to keep, so your money can keep working for you. Taxes are taxing enough without paying more than you need to pay. Canopy has a Certified Public Accountant (CPA) on staff that oversees all tax planning to ensure that the clients' financial plans are tax-efficient.

5) Estate Planning – Transferring Wealth: Where there's a will, there's a way to transfer wealth to the next generation, enabling your legacy to continue after you are gone. Knowing what to include in your will, how and when to develop specific types of trust and powers of attorney documents, and how to arrange for business succession plans are all part of the power of the plan that Canopy develops for each of its clients. Even after you are gone, your money will still be working for you. We work with an estate planning attorney, who has more than 40 years experience designing complex estate plans including wills, trusts, powers of attorney, long-term care Medicaid planning, and business succession contracts to enable your estate to work well with your comprehensive financial plan.

Meet The "Can-Do" Team of Canopy



Michael Fowler



H.S. James F. Byrnes 83
Spartanburg Meth College- AA 83-85
Georgia Institute of Technology 85-87
Signed professionally with Atlanta Braves 87-89
Played 3 seasons- Pulaski, Durham Bulls x2
Played Professional Baseball in Italy 1990 Macerata
Sam Wyche Sports world Store Manager 1991-1992
Waffle House Inc- District Manager 92-97
Began Work in Insurance/ Finance 1997- Present
Lives in Taylors with wife of 30 years, Sabrina and our 4 children

Traits

Honest, hard working, committed, reliable, trustworthy.
Active in community and church

Skills

Listening, problem solving, product knowledge

"Do unto others as you would have them do to you"

I am super excited to to be apart of the Canopy Greenville LLC team. Having grown up and lived in this area my entire life, I am familiar with the growth this area has experienced. With 25 plus years of experience in the insurance business, I help my clients prepare and plan for the unexpected curve balls that life always seems to throw at us. How many of you have an ongoing relationship with the agent or Rep that you purchased your life, disability, or long-term care plan from? Interested in annuities for your portfolio? As an independent broker I have access to most companies and can help evaluat existing annuity contracts.

It's really simple:

1. If you are not working with someone who can cover all of your needs and answer all of your questions, then give us a chance.
2. If you are working with someone, then good for you but you should still give us a chance. Our commitment to promptly answering or returning your calls gives us an edge over most agents/ reps. We are committed to helping each of our clients with personalized plans to fit their needs and goals. Not lumping them together. I look forward to hearing from you and thank you for your business.



ROBBY T BRYANT CEO, CFP, CEA

Robby T. Bryant, founder and president of Magnolia Financial Planning Services, Inc. since 1998, is the Chief Executive Officer (CEO) of Canopy Financial Planning, LLC. Mr. Bryant has over twenty years of experience in long-term investment strategies and comprehensive financial planning. A graduate of Duke University, he is a Certified Estate Advisor (CEA) and has earned the Certified Financial Planner (CFP) designation by the Certified Financial Planner Board of Standards. Mr. Bryant has extensive expertise in investment management, comprehensive financial planning, and estate planning.

PATRICIA LANDRY, MD

Patricia Landry, MD is an analyst for Canopy Financial Planning, LLC. She has a Bachelor of Science in Chemistry and a Bachelor of Arts in Psychology from Winthrop University. After being awarded a Doctorate in Medicine from the Medical University of South Carolina (MUSC), she completed her residency in Family Practice at the Medical College of Georgia. Her 28 years of experience as a board-certified family physician provide her with significant professional insight into the pharmaceutical and medical device sectors.



CHANTEL SAPUTO, CFO, Investment Analyst

Chantel Saputo is the Chief Financial Officer (CFO) of Canopy Financial Planning, LLC. She is an investment analyst and financial planner. She is currently working towards her Investment Advisor Representative designation.

JASON S. WHITE, CFP, CPA, PFS

Jason White is a Certified Financial Planner (CFP), a Certified Public Accountant (CPA), and a Personal Financial Specialist (PFS). He graduated from Clemson University with a degree in Financial Management with a minor in Accounting. Mr. White has expertise in wealth management, retirement planning, business tax prep, trust formation, and estate plan design.

Nathalie Cote, CFP, PHD

Nathalie Cote is a Certified Financial Planner (CFP) and Professor at Belmont Abbey College. She has expertise in comprehensive financial planning, retirement planning, tax planning, insurance planning and estate planing.

LOWELL E. MACHER, IAR

Lowell Macher is an Investment Advisor Representative (IAR) with over twenty years of experience in mortgage banking and investments. He graduated from the University of South Florida with a degree in Accounting.

LUCY LEA ROLLINS, Registered Paraplanner

Lucy Lea Rollins is a Financial Assistant with over twenty years of accounting experience. She graduated from Clemson University with a degree in Accounting and has completed her Certified Paraplanner Designation with the College of Financial Planning.

DEMITREUS “DOE” HENDERSON, CMO

“Doe” Henderson is the Chief Marketing Officer (CMO) of Canopy Financial Planning. He has over 15 years of marketing and branding experience working with some of today’s top celebrities and brands. He graduated from the University of Hawaii at Monoa where he was a four-year letterman and captain of the football team.



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